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State of Wisconsin
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TO: **W-2 Agencies
Training Staff**

FROM: Margaret McMahon, Director
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Division of Family and Economic Security
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BWF OPERATIONS MEMO

No: 17-12

DATE: 04/25/2017

W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>	RAP	<input type="checkbox"/>	Other EP	<input type="checkbox"/> *

SUBJECT: *Career Assessment Definition and Clarification of Assessment Types*

CROSS REFERENCE: W-2 Manual sections [1.2.3](#), [1.4.4](#), [2.9.2](#), [5.1.1](#), [5.1.2](#), [5.2.1](#), [5.2.2](#), [6.1.1](#), [7.1](#), [Glossary](#), [Activity Codes](#)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to communicate additions to W-2 policy that expand the definitions of the terms *career assessment*, *educational needs assessment*, and *vocational evaluation or assessment*. This memo also provides clarification about assessment types with a focus on the distinctions between the different assessment types.

BACKGROUND

In 2015, the Bureau of Working Families (BWF) convened a workgroup to review and examine the use of career and vocational assessment tools by W-2 agencies and their Financial and Employment Planners (FEPs). The analysis of W-2 policy, a statewide survey, and the review of W-2 agencies' Standard Operating Procedures showed that the W-2 program and its participants would benefit from an increased emphasis on the use of assessment tools in case management practices, particularly career assessments. The analysis also showed that there is a need to make a clear distinction between assessment types and their role in the case management process.

The workgroup found that W-2 policy needs to be clear that agencies should use career assessments to identify W-2 applicants' or participants' work styles, skills, and interests. Educational needs assessments measure and determine participants' educational levels and aptitudes, while vocational evaluations or assessments are a type of formal assessment used to identify the unique strengths, resources, and experiences of an individual in order to match that person's abilities and preferences to appropriate work placements, jobs, or training programs.

BWF is working to develop policy and program requirements that will require agencies to use specific career assessments during the informal assessment process and throughout ongoing case management.

This memo outlines policy clarifications to draw clearer distinctions between the various types of assessments in anticipation of implementing statewide career assessment tools and program requirements.

POLICY CHANGES

- **Note:** The following policy update and two policy clarifications are tracked in the [attached](#) document.

CURRENT POLICY:

W-2 policy requires that participants complete an informal assessment as part of the process of gathering information needed to develop an Employability Plan (EP) customized for the participant. The purpose of the informal assessment process is to assist the FEP in identifying the needs of W-2 participants to promote work readiness, to connect participants to education and training needed to obtain family-sustaining employment, and to determine if additional formal assessments are necessary to identify possible barriers to employment. (W-2 Manual [Chapter 5](#))

Though current policy and contractual obligations already require W-2 agencies to include career assessments and career exploration activities in their case management practices and procedures, the Bureau of Working Families has created definitions for the various assessment types, clarified policy, and updated W-2 Activity Codes to better support more effective use of career assessment tools.

NEW DEFINITIONS:

The following definitions have been added to the W-2 Manual Glossary section:

Career Assessment

Career assessments are a broad spectrum of assessment tools that W-2 agencies and job seekers use to obtain greater awareness about how a participant's *work styles*, *skills*, and *interests* can be used to define a career path, assign meaningful activities, highlight strengths, identify training needs, and match the participant to employment opportunities.

Educational Needs Assessment

Educational needs assessments are tools used to measure and determine a participant's educational levels. Educational needs assessment tools, like the Test of Adult Basic Education (TABE) or Wide Range Achievement Test (WRAT), test skills and aptitudes in reading, language, math computation, and applied math in order to identify current math and reading comprehension levels and any literacy or numeracy deficiencies.

Vocation Evaluation or Vocational Assessment

Vocational evaluations/assessments are conducted to help individuals living with a disability establish realistic vocational goals and a plan to achieve them. The vocational evaluation process is designed to assess the unique strengths, resources, and experiences of an individual in order to match that person's abilities and preferences to appropriate work placements, jobs, or training programs. The process is interactive; the intent is for staff to learn about the participant and the participant to learn about themselves.

Additionally, the W-2 Manual has been updated to include expanding text definitions. See [attached](#).

In order to effectively measure work styles, skills, and interests by using career assessment tools, more than one tool is often necessary to capture the results for all three characteristics. The following three definitions have been included in W-2 Manual section [5.1.2](#) to provide expanded clarification to work styles, skills, and interests related to career assessment tools and results:

- **Work styles** – Refers to the participant's patterns of action or conduct, such as attendance, punctuality, appropriate appearance, ability to work with others, obeying rules, following directions, and completing tasks. Work style-focused career assessments can demonstrate the participant's attitudes and job readiness.
- **Skills** – Refers to the participant's skills or understanding of specific tasks related to employment, like cooking or computer programming. Skills-focused career assessments can include knowledge, aptitude, and ability. Skills can relate to a particular occupation, as typically listed in a job announcement to describe the tasks of a position.
- **Interests** – Refers to the participant's likes of particular objects, activities, and personalities using the theory that individuals with the same career tend to have the same interests. Interest-focused career assessments help participants identify work-related interests and find the types of careers that match. The results can be used to help participants learn which careers they are most likely to enjoy, including careers they may not have had knowledge of.

POLICY CLARIFICATION:

Career Assessment vs. Educational Assessment

W-2 Manual, Section [5.1.2](#) "Assessment as Part of On-Going Case Management" has been updated to include a greater emphasis on the role of career assessments in the case management process. This policy clarification makes a stronger distinction between educational needs assessments and career assessments. W-2 agencies are required to conduct Educational Needs Assessments with all new W-2 applicants and with W-2 participants prior to making a placement change. These assessments identify participants' current educational levels; however, educational needs assessments are not designed to evaluate work styles, skills, and interests as captured by career assessments. Results from educational needs assessments, career assessments, and vocational evaluations or assessments (as applicable) should be used in tandem to generate a more complete understanding of participants' educational levels, skills, interests, and work styles to better inform the development of effective EPs and assignment of meaningful activities to help participants gain family-sustaining employment.

Additionally, the W-2 Manual has been updated to clarify and emphasize the distinction between and the importance of career assessments and educational needs assessments, including updating the Career Planning and Counseling and Up-front Career Planning W-2 Activity Codes. See [attached](#).

AGENCY ACTION

W-2 agencies must familiarize staff with these updates and clarifications with regard to the definitions of career assessment, educational needs assessment, and vocational evaluation or assessment. The Partner Training Team is updating trainings and materials to reflect these policy updates and clarifications. BWF will communicate further agency action with the upcoming development of statewide career assessment tools and new program requirements.

CARES AND CWW CHANGES

There are no systems changes associated with these policy updates and clarifications.

ATTACHMENTS

[W-2 Manual, Glossary Additions](#)

[W-2 Manual, Section 1.2.3 Financial and Employment Planner \(FEP\)](#)

[W-2 Manual, Section 1.4.4 Determining and Making a W-2 Placement](#)

[W-2 Manual, Section 2.9.2 Up-Front Job Search Activities as a Condition of Eligibility](#)

[W-2 Manual, Section 5.1.1 Assessment at Application](#)

[W-2 Manual, Section 5.1.2 Assessment as Part of On-Going Case Management](#)

[W-2 Manual, Section 5.2.2 Informal Assessment Inventory](#)

[W-2 Manual, Section 6.1.1 Parts of the Employability Plan](#)

[W-2 Manual, Section 7.1. Introduction \[to Placement\]](#)

[W-2 Manual Appendix – Activity Codes: CE and UC](#)

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For W-2 CARES Processing Questions: W-2 Help Desk

DCF/DFES/BWF/JC